

Arizona Department of Education

FY11 Concurrency and Limiting Module Changes

Business Rules

Provided by School Finance



FY 2011

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1 Overview

1.1 Mission

To limit ADM for a student throughout the school year as mandated by state statute as well as to eliminate the Concurrency Module. In order to streamline and make processing more efficient, all ADM limiting will be done within the Limiting Module, thereby eliminating the need for the Concurrency Module.

2 Governing Statutes, Rules and Resources

2.1 [A.R.S. § 15-393 \(D\)\(3\)](#)

This statute defines the ADM limitation required for a student enrolled in a JTED satellite and a district school.

2.2 [A.R.S. § 15-393\(G\), \(H\)](#)

This statute allows students who reside within the boundaries of the JTED to attend any main/centralized or satellite campus within the JTED tuition-free.

2.3 [A.R.S. § 15-393\(O\)](#)

This statute defines the limitation of ADM and apportionment between member district and a JTED main/centralized campus.

2.4 [A.R.S. § 15-808\(F\)](#)

This statute defines the limitation of ADM and apportionment between an AOI within the member district and a JTED main/centralized campus.

2.5 [A.R.S. § 15-901\(A\)\(2\)\(b\)\(iii, iv, v\)](#)

This statute defines the limitation of ADM for concurrent enrollments in two districts or two charter schools, in a school district and charter school

3 Business Rules

All rules apply to fiscal year 2011 forward, unless specified otherwise.

3.1 Concurrency Module

- 3.1.1 Eliminate the concurrency module. All rules currently in the concurrency module will be either eliminated or moved elsewhere for processing. The action to be taken for FY 11 is identified in Table 1 below.

Table 1 Concurrency Rules Modifications

<u>FY11 Business Rules</u>	<u>FY10 Concurrency Rule</u>	<u>FY11 Rule Action</u>
3.1.1.1	1. All memberships shall be considered valid upon submission	Move to Aggregation processing. See rule 3.5.3.
3.1.1.2	2. In no case will any adjusted FTE exceed the submitted FTE.	Rule to be eliminated.
3.1.1.3	3. Exclude any invalidated memberships.	Move to Aggregation processing. See rule 3.5.3.
3.1.1.4	4. Exclude all AOI memberships from concurrency membership processing.	Rule to be eliminated as there will no longer be any concurrency membership processing.
3.1.1.5	5. Exclude all JTED Main or Central memberships from concurrency membership processing.	Rule to be eliminated as there will no longer be any concurrency membership processing.
3.1.1.6	6. When JTED satellite membership overlaps with only District memberships that are not part of its member District, JTED Satellite FTE shall be adjusted to 0 during the overlap. (JTED /Charter overlap will be handled by limiting module)	Replaced by rule 3.5.2.

<u>FY11 Business Rules</u>	<u>FY10 Concurrency Rule</u>	<u>FY11 Rule Action</u>
3.1.1.7	7. If there is an overlap of JTED satellite memberships and resident member District memberships, the sum of the FTEs for all non JTED satellite memberships during the period of overlap shall be proportionally limited to 1.0 and any overlapping JTED Satellite membership shall have its FTE limited to the remainder of 1.25 minus the sum of the FTE of the non JTED satellite memberships during the overlap.	Rule to be eliminated as the limiting already occurs within the Limiting Module.
3.1.1.8	8. If there is no JTED Satellite membership in the overlaps and there is a District membership that overlaps a Charter membership, then the sum of the FTEs for all of the non-JTED Main memberships during the overlap shall be proportionally limited to 1.0.	Rule to be eliminated as the limiting already occurs within the Limiting Module. See FY10 Limiting Module and Concurrency Changes business requirement 1.2.4.
3.1.1.9	9. Any JTED satellite membership without any overlapping membership shall not have its FTE adjusted.	Rule to be eliminated.

3.1.2 FTE must not be adjusted in any situation.

3.2 Limiting Module

3.2.1 All memberships must be considered valid upon submission.

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3.2.2 JTED Main/Centralized and Member District Limited ADM of 1.75

3.2.2.1 ***The sum of the ADM for a student who is concurrently enrolled in a JTED main/centralized campus and a member district must be limited to 1.75.***

3.2.2.2 ***The maximum apportioned amount (Limited ADM) must not exceed 1.0 for either entity.***

3.2.2.3 ***Apportionment of ADM between the JTED and the member district is based upon the membership days submitted by each district for the student.***

3.2.2.3.1 In cases where the sum of the ADM is greater than 1.75, the apportionment (Limited ADM) must be proportionate based on the membership days submitted by each entity.

3.2.3 The calculation for Limited ADM is as follows. It remains the same as fiscal year 2010 (unless otherwise specified) and is included here for documentation purposes only.

3.2.3.1 ***Definitions:***

3.2.3.1.1 **Days Allowed in Reporting Period** = Maximum Fundable Days

3.2.3.1.1.1 Maximum fundable days = 100, unless a JTED is involved.

3.2.3.1.1.2 Maximum fundable days = 125 (100 * 1.25) in the following situations:

3.2.3.1.1.2.1 *A JTED satellite enrollment and a member district enrollment occur concurrently.*

3.2.3.1.1.2.2 *A JTED satellite or main/centralized campus enrollment and a charter enrollment occur concurrently.*

3.2.3.1.1.3 For FY 2011 forward, the maximum fundable days = 175 (100 * 1.75) in the following situation:

3.2.3.1.1.3.1 *A JTED main/ centralized campus and a member district enrollment occur concurrently.*

3.2.3.1.2 **Limiting Factor** = Days Allowed in Reporting Period/Total Membership Days of all memberships being prorated.

3.2.3.1.3 **Limited Membership Days** = Original Membership Days * Limiting Factor

3.2.3.1.4 **Limited Absence Days** = Original Absence Days * Limiting Factor

3.2.3.2 *Limited ADM = Limited Membership Days/Days Allowed in Reporting Period*

3.2.3.3 *Limited ADA = (Limited Membership Days – Limited Absence Days) / Days Allowed in Reporting Period*

3.2.4 Memberships within the member district at an Arizona Online Instruction (AOI) school follow the ADM limitation and apportionment rules as stated within section 3.2 of this document.

3.2.5 ADM is limited according to Table 2. The majority of the limits are currently in place and are being restated in this document for clarification purposes only. Changes are specified with an effective date of FY 2011 in the Effective Date column. Memberships may include subsequent and/or concurrent memberships and are specified in the table below.

3.2.5.1 *When more than two concurrent or subsequent enrollments exist and multiple entity combinations from Table 2 apply, then the higher maximum ADM limit takes precedence.*

Table 2 Limiting Module ADM Limits

<u>Entity Combination</u>	<u>Maximum Limited ADM</u>	<u>Concurrent or Subsequent Memberships</u>	<u>Limiting Method¹</u>	<u>Effective Date²</u>
JTED Satellite/Charter	1.25	Concurrent only	Max of 1.0 each.	
JTED Main/Charter	1.25	Concurrent only	Max of 1.0 each.	
JTED Satellite/Member District	1.25	Concurrent only	Max of 1.0 each.	
JTED Main/Member District	1.75	Concurrent only	Proportionate, see 3.2.2 for additional details. Max of 1.0 each.	FY 2011 forward

¹ Limiting method is as per 3.2.3, unless otherwise specified.

² Effective date is prior to FY 2011, unless otherwise specified.

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<u>Entity Combination</u>	<u>Maximum Limited ADM</u>	<u>Concurrent or Subsequent Memberships</u>	<u>Limiting Method¹</u>	<u>Effective Date²</u>
JTED Satellite/Non-Member District	N/A or 1.25* * Limit is 1.25 if the non-member district is a type 03 common school district not within a high school district	N/A	JTED Satellite membership is not fundable, unless the non-member district is a type 03 common school district not within a high school district.	FY 2011 only for the type 03 exception
JTED Main/Non-Member District	N/A or 1.75* * Limit is 1.75 if the non-member district is a type 03 common school district not within a high school district	N/A	JTED Main membership is not fundable, unless the non-member district is a type 03 common school district not within a high school district.	FY 2011 only for the type 03 exception
District/District	1.0	Concurrent or Subsequent		
District/Charter	1.0	Concurrent or Subsequent		
Charter/Charter	1.0	Concurrent or Subsequent		
District AOI/District	1.0	Concurrent or Subsequent		
District AOI/Charter	1.0	Concurrent or Subsequent		
Charter AOI/District	1.0	Concurrent or Subsequent		
Charter AOI/Charter	1.0	Concurrent or		

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<u>Entity Combination</u>	<u>Maximum Limited ADM</u>	<u>Concurrent or Subsequent Memberships</u>	<u>Limiting Method¹</u>	<u>Effective Date²</u>
		Subsequent		
Member District AOI/JTED Main	1.75	Concurrent only	Max of 1.0 each.	
Member District AOI/JTED Satellite	1.25	Concurrent only	Max of 1.0 each.	
Non-Member District AOI/JTED Main	N/A or 1.75* * Limit is 1.75 if the non-member district is a type 03 common school district not within a high school district	N/A	JTED Main membership is not fundable, unless the non-member district is a type 03 common school district not within a high school district.	FY 2011 only for the type 03 exception
Non-Member District AOI/JTED Satellite	N/A or 1.25* * Limit is 1.25 if the non-member district is a type 03 common school district not within a high school district		JTED Satellite membership is not fundable, unless the non-member district is a type 03 common school district not within a high school district.	FY 2011 only for the type 03 exception
Charter AOI/JTED Main	1.25	Concurrent only	Max of 1.0 each.	
Charter AOI/JTED Satellite	1.25	Concurrent only	Max of 1.0 each.	
JTED only membership where student is a resident	1.0	N/A		FY 2011 forward

<u>Entity Combination</u>	<u>Maximum Limited ADM</u>	<u>Concurrent or Subsequent Memberships</u>	<u>Limiting Method¹</u>	<u>Effective Date²</u>
of a member district (no concurrent memberships) JTED membership can be either satellite or main.				
All other combinations	1.0	Concurrent or Subsequent		

3.3 Definition Changes

3.3.1 The term “non-resident member district” no longer exists. Each member within a JTED is a “member district”.

3.3.2 The term “Resident member district” is replaced by “member district”.

3.3.3 The term “member district” is defined as a district that is a member of the JTED district. Taxpayers within the district pay an additional levy which is used to supplement the aid paid to the JTED.

3.3.3.1 ***This definition change modifies the logic behind each of the entity combinations listed in Table 2 that refer to a member district. Since “member district” now refers to any district that is a member of the JTED, if the DOR is one of the member districts of the JTED, then the student may attend any of the campuses (satellite or main) within the JTED and be eligible to generate state aid.***

3.4 JTED Only Memberships

3.4.1 JTED memberships (satellite or main) for students who reside in a member district without an accompanying concurrent district or charter membership generate ADM.

3.4.2 A student who resides in a member district and attends a private school for regular education may enroll in a JTED satellite or main campus and generate ADM for the JTED membership.

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3.4.3 The JTED membership ADM limit is 1.0 for either campus type.

3.5 Funding Ineligibility

3.5.1 A student who is enrolled in a JTED Main/Centralized or JTED satellite and is not a resident of one of the JTED's member districts must not generate fundable ADM.

3.5.1.1 ***The exception to this rule is students who reside in an elementary not in a high school district (type 03). These students will generate fundable ADM. This exception is applicable for FY 2011 only.***

3.5.1.2 ***The membership at the JTED campus is non-fundable.***

3.5.2 The FTE of a student at a JTED Satellite with concurrent enrollments in a JTED Satellite and a non-member district must no longer be set to zero.

3.5.2.1 ***As a non-fundable membership, the membership must appear on the SdADMS76 report.***

3.5.3 Invalid memberships must not generate fundable ADM.

3.6 Enterprise Application

3.6.1 The ability to identify an entity as a JTED satellite campus must be available within Enterprise. User must be able to modify and enter that the entity is a JTED satellite campus.

3.6.2 The ability to identify an entity as a JTED main/centralized campus must be available within Enterprise. User must be able to modify and enter that the entity is a JTED main/centralized campus.

3.6.3 The ability to identify each member district of a JTED must be available within Enterprise. User must be able to modify and enter that the entity is a member district of a JTED.

3.7 Entity Profile Form

3.7.1 Upon submitting an entity profile form addition/modification request to School Finance:

- A JTED must identify their campus type, whether main/centralized or satellite.
- A district must have the ability to specify that they are a member district of a specific JTED.

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4 Known Affected Applications/System Areas

4.1.1 Limiting Module

4.1.2 Concurrency Module

4.1.3 Enterprise

4.1.4 Entity Profile Form

5 Glossary

Term

Is Defined As:

ADM

Average Daily Membership, as defined in [A.R.S. § 15-901\(A\)\(2\)](#)

Concurrent Enrollment

An enrollment where at least one day of the enrollment (membership) is shared with another enrollment (i.e., the enrollments have an overlap of at least one day.)

JTED

Joint Technical Education District, as defined in [A.R.S. § 15-393](#).

JTED Main/Centralized Campus

A campus of the JTED that is either a standalone campus with no physical connection to a member district campus or a campus that is on property owned by and leased from a member district and that is central to multiple member districts and is attended by many member district students.

JTED satellite campus

A campus of the JTED that is on the member district campus. The administration of the students attending this type of campus is performed by the member district.

Member District

A school district that has joined the JTED and whose taxpayers are paying a secondary tax which allows the students residing within the school district to enroll in and attend classes at the JTED without being charged tuition.

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Subsequent Enrollment

An enrollment (membership) that occurs in the same fiscal year as another enrollment and yet they have no days in common; they do not overlap at all.